

# Jacob V. Erlich

National Cheng Kung University ♦ 1 University Road, Tainan City, 70101 ♦ Taiwan, Republic of China  
Mobile - 0986289205 ♦ Jacob.Erlich@gmail.com

## INTRODUCTION

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I am an international MBA student with a background in banking, recent experience in business development and an ongoing passion for helping others.

## EXPERIENCE

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**BizPIE** (www.bizpie.pbwiki.com), Tainan, Taiwan 10/06 – present  
*Entrepreneur & Instructor*

Designed, marketed and implemented a course focused on building confidence in speaking English

- Instructor: Guided 45 students (per semester) along a 10-week (20 hours) course focused on building awareness of good presentation techniques and delivering your message effectively
- Knowledge Sharing: Designed and utilize an internet based wiki site for the purpose of marketing, sharing information and collaboration/interaction with the students and others
- Multicultural Learning: Environment of learning from each other sharing our observations, concerns and suggestions

**HSBC Bank**, New York, NY 10/04 – 3/06  
*Credit Analyst*

- Partnerships: Established relationships with business partners (i.e. PCM, Trade) to enhance referral sources and stimulate cross-sell opportunities
- Client Interaction: Discussed strategic objectives, financing needs, and historical performance with clients/prospects and bank managers
- Portfolio Management: Supported Relationship Managers in the ongoing monitoring of 30+ client relationships each maintaining a credit facility ranging from USD 2-50 million
- Credit Analysis: Detailed analysis of clients/prospects financial statements, credit risks and mitigates collateral, industries, and management

**GreenPoint Bank**, New York, NY 7/03 – 10/04  
*Small Business Relationship Manager*

- Client Management: 50+ small-business accounts representing over \$10 million in balances
- Business Development: Needs-based sales process of targeted cold-calls, prospect follow-ups and in-person meetings. Consistent pipeline of 300 prospects and multiple centers of influence
- Operations Management: Day-to-day branch performance: sales, operations and compliance

## LEADERSHIP

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Delta Sigma Pi

America's foremost professional fraternity for men and women pursuing careers in business

- As president, led a professional organization of 65+ diverse members in achieving set goals

## EDUCATION

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**National Cheng Kung University** 9/06 – present  
Masters in International Business Administration

**University at Buffalo** 8/99 – 5/03  
Bachelor of Science in Business Administration  
Concentration: Marketing and Organizational Behavior  
Management GPA 3.52/4.0

## COMPUTER SKILLS

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Application Software: Microsoft PowerPoint, Excel, Publisher, Outlook, Word

Social Software: Wiki, Blog, Social Networking & Bookmarking

Design Software: Adobe Photoshop 7.0

Mandarin (Chinese) language – Beginner